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What Conveyancers Need to Know When Elderly Clients Buy Property

Become conversant in basic estate planning concepts to help clients flag potential estate planning issues and seek qualified counsel in a timely manner

Representing elders in a property purchase can raise complex questions. Irrevocable trust planning for a primary residence or vacation home can be critical for the family's financial future should the elder need to enter a nursing home and qualify for Medicaid benefits. Ensuring that the elder has a properly drafted durable power of attorney can avoid the expense and delay of a protracted conservatorship proceeding in court when an elder's home needs to be sold or transferred after incapacity has struck. Simply asking if the elder has a will can avoid the necessity of an additional court proceeding for the personal representative to obtain a license to sell the property after the elder's death. Conveyancers need to be conversant in these concepts to help clients flag potential estate planning issues and seek qualified counsel to address them in a timely manner.



Agenda

- 12:00 - 12:10 pm , When Elderly Clients Buy Property: Options for Taking Title
 - Sole ownership by Individuals, Trusts, Corporate Entities and Other Organizations
 - Two or more owners - Options for Taking Title
 - Life Estates/Term Interests
- 12:10 - 12:20 pm , When Elderly Clients Buy Property: Powers of Attorney
- 12:20 - 12:30 pm , When Elderly Clients Buy Property: Avoiding Probate Proceedings
- 12:30 - 12:40 pm , When Elderly Clients Buy Property: MassHealth Planning Considerations: Irrevocable Trusts and Life Estates
- 12:40 - 12:45 pm , When Elderly Clients Buy Property: Types of Homesteads
- 12:45 - 12:55 pm , When Elderly Clients Buy Property: Planning for Estate Tax

Faculty

- Christine Boutin, Esq., Mirick, O'Connell, DeMallie & Lougee LLP, Worcester
- Laurel M. Millette, Esq., Transitions Law LLC, Concord
- Kristin A. Monaco, Esq., Nigro, Pettepit & Lucas LLP, Newburyport
- Carrie B. Rainen, Esq., Rainen Law Office, PC, North Andover

Dates

- ON DEMAND WEBCAST (#2240157WBA): Watch starting Tuesday, 6/4/2024

Tuition

- \$145.00
- \$145.00 Members
- \$145.00 New Lawyers
- **FREE** for MCLE OnlinePass Subscribers
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Materials Included with Your Tuition

- All presentation materials, including faculty slides and handouts, in electronic format

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